Current Support Report
Selected PIs
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Overview

Purpose
The primary business objective for this report is to fulfill Sponsor requirements for Principal Investigators to provide a list of current awards as a condition for funding consideration. For example, see NIH’s Current and Pending Support requirement. The secondary purpose is to inform business decisions about related matters (e.g., responding to requests for matching funding or for teaching relief, or considering potential space needs, or facilitating the analysis and distribution of staff workload).

This report would aim to answer the following business questions

- What is investigator X's current portfolio of awards? (note that individuals looking for their own portfolio of awards will be able to use the Current Support - My Proposals report; this Current Support - Selected PIs report is intended more for individuals preparing or approving such as Contract/Grant preparers and approvers and unit heads)

- What is the current portfolio of awards for all of the investigators I serve as Fund Manager?

- Which of Unit Y's investigators are currently listed in awards running through any lead unit?

*Current information is defined as information originating from the Coeus Award module, which is downloaded to the reporting environment on a nightly basis.

Award Records Displayed in Report
This report displays information about active award records found in the Coeus Awards module. Active awards are considered current awards for sponsor reporting purposes.

To be considered “active,” the award’s overall end data will be greater than or equal to today’s present date, where the present date automatically updates on a daily basis.
Report Security

Any user meeting the following criteria will be allowed to use this report:

1. All individuals who have been assigned a COEUS role that authorizes them to prepare and/or approve contract/grant proposals: this would include unit-level staff handling pre-award activity, unit-level approvers, and SPO reviewers/approvers. Ex Clinical Trial Coordinators/Project Managers, Fund Managers

2. Individuals who serve as Unit Heads (academic or administrative) at any level of the organization: this would include MSO's, DBO's, Asst. Deans, Asst. VC's, Chairs, Directors, Deans, VC's, and the Chancellor.

3. Assistants to the Unit Heads, meaning those individuals who would be pulling reports on behalf of the Unit Head.

Specifically, the report has been configured to allow the following ALTNG roles to access the report:

- Department Manager
- Department Approver
- Department Admin
- SPO Proposal Analyst
- SPO Awards Analyst
- SPO Viewer
- OPAFS Awards Analyst

If you would like to use this report, please ask your DSA to request one of the ALTNG roles listed above.
**Report Fields**

This report makes use of the following fields, listed below in alphabetical order:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Name</th>
<th>Field Name</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year Effort</td>
<td>Award REMS Foreign Indicator</td>
<td>Investigator Employee ID</td>
<td>Prime Sponsor Code</td>
</tr>
<tr>
<td>Anticipated Direct Cost</td>
<td>Award REMS Sponsor Agency</td>
<td>Investigator Full Name</td>
<td>Science Code Name</td>
</tr>
<tr>
<td>Anticipated Indirect Cost</td>
<td>Award REMS Sponsor Category</td>
<td>Investigator Home Unit</td>
<td>Sponsor</td>
</tr>
<tr>
<td>Award Budget Period End Date</td>
<td>Award REMS Sponsor Sub-Agency</td>
<td>Investigator Home Unit Code</td>
<td>Sponsor Award Number Tier1</td>
</tr>
<tr>
<td>Award Budget Period Start Date</td>
<td>Award Status</td>
<td>Investigator Role</td>
<td>Sponsor Code</td>
</tr>
<tr>
<td>Award Fund Number</td>
<td>Award Title</td>
<td>Lead Department Code</td>
<td>Summer Effort</td>
</tr>
<tr>
<td>Award Organization Code</td>
<td>Award Transaction Type</td>
<td>Lead Department Name</td>
<td>Total Anticipated Cost</td>
</tr>
<tr>
<td>Award Organization Name</td>
<td>Award UCSD Prime Sponsor Major Agency</td>
<td>Obligated Direct Cost</td>
<td>Total Obligated Cost</td>
</tr>
<tr>
<td>Award Overall End Date</td>
<td>Award UCSD Sponsor Major Agency</td>
<td>Obligated Indirect Cost</td>
<td>Total Pending Cost</td>
</tr>
<tr>
<td>Award Overall Start Date</td>
<td>Calendar Year Effort</td>
<td>OP Reporting Date</td>
<td>UCSD Award Number - Base</td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Foreign Indicator</td>
<td>Cost Sharing Total</td>
<td>Pending Direct Cost</td>
<td>UCSD Award Number - Full</td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Sponsor Agency</td>
<td>ePD Number</td>
<td>Pending Indirect Cost</td>
<td>VC Area Name</td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Sponsor Category</td>
<td>Funding Source Code Name</td>
<td>Percent Effort</td>
<td>VC Area Name for Investigator’s Home Unit</td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Sponsor Sub-Agency</td>
<td>Institute Proposal Number</td>
<td>Prime Sponsor</td>
<td>Prime Sponsor Code</td>
</tr>
</tbody>
</table>

All fields listed above are displayed in the *Raw Data View* report page (see the *Report Tab Navigation* section for more details).
Report Access

Accessing the Report via the Reporting Blink Page

This report is available via the eRAP Reporting Blink page. Clicking the Run Report button for this report will take you directly to the report.

Procedure

1. Go to the eRAP Reports Blink site:
3. Under the Research Administration Reports section, click on the Run Report button for the Current Support – Selected PIs report
4. You will be redirected to the Reporting Environment. Enter your Active Directory username and password to log in
5. Click OK
6. The report’s filter options are now displayed on the screen
Accessing the Report via the Reporting Environment Directly
This report is available by directly accessing the Reporting Environment. Navigating to the Reporting Environment directly will also allow you to access the report.

Procedure

1. Go to the Cognos web site: [https://bianalytics.ucsd.edu/ibmcognos/bi/](https://bianalytics.ucsd.edu/ibmcognos/bi/)
2. Enter your **Active Directory** username and password to log in
3. Click OK
4. You should now see the Cognos **Welcome** screen:

5. Click on the **Team Content** icon

6. From **Team Content**, navigate to the **Public Reports** folder
7. From **Public Reports**, navigate to the **Research Administration** folder
8. Locate the **Current Support – Selected PIs** report
9. Click on the link for the report name to run the report
10. The report’s filter options are now displayed on the screen
Accessing a Previously Saved Report View
You can access your previously saved report version(s) from the reporting environment

Procedure

1. Go to the Cognos web site: https://bianalytics.ucsd.edu/ibmcognos/bi/
2. Enter your Active Directory username and password to log in
3. Click OK
4. You should now see the Cognos Welcome screen:

5. From the welcome page select My content from the Navigation Panel and locate your report. To run your report, locate it from the list and click on its name.

Note – the section, Saving a Custom Report Version with Selected Filter Values, demonstrates how to create the Report View and a tip to save the report as a “Favorite” to your browser for quicker access.
Report Features

Selecting Initial Report Filters

On initial report run, the first screen presented to the user will be the Report Filter Parameters page. To display report data, a user must first select the filters he/she would like to apply to the report from this filter choices page. Once any/all filters choices are selected, the report will continue to the Formatted Data View page and show only proposal records that match the selected filter values.

Procedure

1. Select your initial filter values from one or more filter options from the report’s Report Filter Parameters page

2. Click the Run Report button

3. Your filter options should now be visible in the Selected Filter Values table
Updating Filters
This report allows you to reset any or all filters that have been previously selected. Unchecking a specific filter value will clear those filter selections and reset the report to only display records that match the newly selected options.

Selecting New Filter Options

1. Click on the Back to Prompts button from the report’s left navigation menu to return to the Report Filter Parameters page

2. Once you are returned back to the Report Filter Parameters page, you will see your existing filter options still selected

3. Click on the Clear Filters button to reset all filter options back to their default state

4. Once all filters have been reset, select any new options you wish to see in the report

5. Once finished making selections, click Run Report to reload the report with the new filter choices

6. The report will now only return records that match your new filter criteria
Using the Narrow Filter Selections Button

You can take advantage of the Narrow Filter Selections button in the Report Filter Parameters page to help you narrow down the list of filter options. By making an initial selection on any filter type and then clicking the Narrow Filter Selections button, you will limit the other filter’s selectable values to only those that are appropriate to your initial selections.

1. From the Report Filter Parameters page, make a selection to one of the filter options.
2. After selecting your initial value(s) from one of the filter options, click on Narrow Filter Selections.
3. The remaining filter options will be refreshed. The new choices displayed will only be applicable for the initial filter selection.
4. You can then pick a second filter choice and click the Narrow Filter Selections button once again to continue to narrow the remaining applicable filter choices.
5. Once finished making selections, click Run Report to reload the report with the new filter choices.
6. The report will now only return records that match your new filter criteria.

For example, if you pick Physics as your initial value from the Lead Unit filter and click on Narrow Filter Selections, notice that now the Lead Unit section will only show Physics as the only choice in that box. Additionally, now the Organization Code filter options have narrowed down to a handful of options that are only applicable to the Physics department. The same principle is true for all other filter options.
Report Tab Navigation

This report has multiple page tabs that are viewable on the top left of the reports main window. Selecting a page tab will take you to that report page.

Procedure

1. From the top left corner of the report’s main window (after having picked initial filter parameters) select from one of the following options
   a. **Formatted View** – this page is meant to be the 90% consumption mode of most users. The list displayed is formatted to provide visual appeal, and quick access/grouping of the most commonly required data points. This is the default tab for the report
   b. **Raw Data** – this page is meant for the user to export all data to excel for more in-depth analysis, if required
   c. **Repeated Data** – this view is meant to allow a user to quickly copy select data into a Sponsor’s Current and Pending Support form. This view shall show all proposals where the Investigator is serving as a Principal Investigator or an Investigator on a proposal record.

2. Once a tab has been clicked, the report’s output will change to match the user’s selection

The following images are an example of what each of the report tabs look like:
This tab has data elements grouped by Investigator in alphabetical order, ascending. Within each investigator grouping, the lead unit is sorted in alphabetical order, ascending. Within each lead unit sub-group, the Overall Project Start Date is listed in chronological order.

This tab displays all data fields listed in the Report Fields section. As a proposal record can have more than one investigator, or multiple science codes, please be careful to avoid double counting items (such as totals) when exporting this data to excel.
Repeated Data

- This view displays select data fields grouped together in a repeated form to ease the copying and pasting of information from the report to a sponsor’s Current & Pending Support form.
- Every group represents the information for a unique proposal record.
- To use this view most efficiently, it is recommended that you filter for a single investigator at a time to avoid accidentally copying information from other investigators into a particular investigator’s pending portion of the sponsor form.
Saving a Custom Report Version with Selected Filter Values

Using Report Views offers users the ability to save prompt/filter values such that they can launch and run the report without the need to select values each time. An unlimited number of report views can be created for any report, each named according to its settings/use.

Procedure

1. Open the report
2. Once the report is displayed on the screen, select any filters you would like to always be applied when you run your ‘custom’ report
3. From the Add this Report icon on the top left of the Toolbar, select Save report as Report View

![Save report as report view](image)

4. From the Save as report view pop-up window, type in a meaningful name for the report you wish to save

![Save as report view pop-up window](image)

5. From the Location section of Save as report view, click the Select My Folders link
6. Once you click Select My Folders, the location will update as:

![Select My Folders](image)

7. Click OK

8. To retrieve the saved copy, click on the My Content icon from the left Navigation Panel. From the extended pane, locate the report you just saved.

![My Content](image)

9. Hovering over the report will display 3 vertical ellipses that will allow you to select the report’s context menu.

![Report Context Menu](image)

10. From the context menu, select Run as

![Run as Options](image)

11. From the Run as pane, click the output format you want and ensure you select Prompt me from the options. Prompt me will allow you to view your saved version with all of your selected filters and also be able to modify the filters if you need to at a later time.
12. Click Run to get to your report

13. After having initially saved the report with its report settings, if you would like to be able to access the report in the future without having to navigate through the Reporting Environment’s interface, create a shortcut to it in your browser.

Exporting the Report to Excel
The data visible in this report, can be exported to Excel for further analysis. Selecting the Run Excel option will download a copy of the report data to Excel.

Procedure

1. Click the “Run” icon on the top left corner of the report

2. Select the Run Excel option

3. A new browser window will be generated and you will see the following message

4. Once the data has downloaded, you will be asked to either open or save the file (depending on the browser you are using)
5. Select the option that matches what you would like to do with the data. *Save as* is recommended if you want to save a copy.

   a. Note – If using the Chrome or Safari browsers, you may not be asked whether to save or open the file. Instead, the downloaded file will appear on the bottom left of the browser window:

   ![Chrome Safari Download](image)

6. If using *Internet Explorer*, you may be prompted with the following *Security* message. Click *Allow* to continue on to the Excel file.

   ![Internet Explorer Security](image)

7. The report will now open in Excel